Behavioral Health Integration (BHI) Worksheet Care Management for Patients with Mental Illness

BHI Implementation Team	Comments
List prospective members of the behavioral health implementation team in your practice.	
Potential members:	
Quality Improvement (QI) Team	
Primary Care Champion	
Behavioral Health Champion	
Management (contracting, hiring, approval of forms)	
Electronic Health Record (EHR) Champion	
Clinical staff	

Care Manager (one or more positions)	Comments
What skills and personality traits will be important for this position?	
What is the Care Manager position's scope of work?	
Who is the Care Manager and who provides oversight for the Care Manager?	
Where is the Care Manager physically located?Proximity to primary care team is highly beneficial.	
What is the Care Manager's schedule?	
If your practice has only a single Care Manager, who is that person's backup? Consider how to create cross coverage between clinical locations.	
Identify your Care Manager's training needs. • How will your practice accomplish this training?	
Identify training needs for other staff members who might provide cross coverage for the Care Manager and new workflows. • How will your practice accomplish this training?	

Primary Care Practice Population	Comments
How many patients does your practice serve?	
How many primary care clinics?	
How many primary care clinicians?	



Primary Care Practice Population	Comments
 What are the highest priority mental and behavioral health conditions for your practice? Consider prevalence, effects on general medical conditions, and conditions for which providers most want assistance. What information can you use to answer these questions (e.g., EHR reports, practice management reports, payer reports)? 	
If you have more than one practice location, consider starting behavioral health integration at the setting most receptive to this approach. Which practice is most receptive to quality improvement efforts in general and for behavioral health specifically? For single site locations, think about which care team or pod may be most receptive to this approach.	
What condition(s) will your practice initially target for behavioral health integration? • What screening instruments will you use to target those conditions?	
How will your practice identify patients with mental and behavioral health conditions who are at higher risk? • How will your practice prioritize its resources to support these patients?	

Workflow	Comments
If your practice implements routine screening for mental and behavioral health conditions, how will you do this and for what conditions?	
How will patients in your practice be referred to the Care Manager?	
How will your practice communicate the new Care Manager's role to staff and patients?	
How will your practice's primary care providers and the Care Manager communicate about patients?	
If the Care Manager is available for immediate consultation with patients, how will he or she be contacted (e.g., via instant messaging or text)?	
How will the Care Manager document the encounter and update the patient's plan of care? • How will you integrate the medical and behavioral health care plan?	



Workflow	Comments
What practice tools (e.g., screeners, care management algorithms) and patient-facing materials (e.g., self-management support, educational) does your practice need to implement your behavioral health integration strategy?	
How will your practice track and proactively target patients? • Will you use a registry?	
What services will be outside the scope of the Care Manager's role and need to referred out?	
What are those referral sources?How will your practice develop a relationship with them?	

Quality Improvement	Comments
What small tests of change will you identify initially?	
What metric(s) will your practice monitor to track your progress for integration and patient outcomes?	
What barriers to implementing behavioral health integration for patients with mental illness do you anticipate in your practice?	
How will you make the Care Manager a partner in patient care?	

Business Plan	Comments
How will your practice support these services financially?	
Does your practice have contractual agreements for behavioral health practitioners?	
Does your practice need new policies to implement behavioral health integration?	

